

Chapter 10 -- Transferring Volumes and Items

Transferring allows you to move holdings from one record or branch to another. This is useful when items have been attached to the wrong record during migration, when they have been mis-cataloged or mis-merged, or when you have items that will be transferred permanently to a different branch of your library.

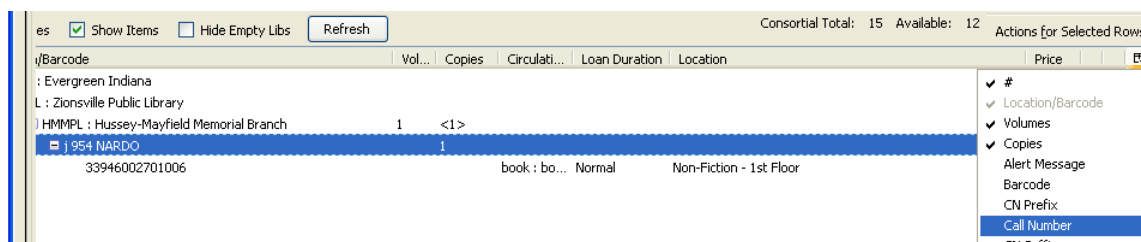
Transferring **volumes** means transferring a *call number and all items attached to that call number* simultaneously to another catalog record or another library.

Transferring **items** means transferring a *single specific item without the call number* to a different call number. It can be a different call number on the same record or a call number on a different record.

NOTE: In most cases *transfer volumes* is used. *Transfer items* is only used when you have multiple items attached to a call number, and you don't want to transfer them all.

TIP: Any time you want to transfer all the items attached to a call number, (even if that's only one item) you will Transfer Volumes. Use Transfer Items when there are multiple items attached to a call number and you don't want to transfer all of them.

TIP: When performing transfers it's very important to highlight the correct line. It may be easier to distinguish between volumes and items and select the correct line if you turn off the Call Number in the Column Picker, as seen below.



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Transferring Volumes from One Record to Another

When you transfer volumes, you are selecting a call number and transferring that call number, plus any and all the items attached to the call number, to a new bibliographic record.

To transfer volumes, in one tab open the record where the volume is currently in the Holdings Maintenance view.

The volume (call number) may have one or more items attached to it.

The screenshot shows the 'Record Summary' tab for record 15918673. The record details are: Title: The wind in the willows, Author: Grahame, Kenneth, Bib Call #: PZ7.G759W1 2008b, Edition: Pub Date: 2008, TCN: 15918673, Database ID: 14970370, Record Owner: FCPLR-CAT1, Created By: FCPLR-CAT1, Last Edited By: FCPLR-CAT1, Last Edited On: 2010-01-11 10:48 AM. The 'Holdings Maintenance' section shows a table with columns: #, Location/Barcode, Circulation M..., Loan Duration, Location, Price, Part, Status. The table contains one row: 1, EG-IN : Evergreen Indiana, 33946001289409, book : book : ... Normal, Fiction , 2nd Floor, 6.95, Damaged. The 'Consortial Total' is 2, 'Available' is 1.

In another tab, open the record where you want the volume to be.

The screenshot shows the 'Record Summary' tab for record ocm45582649. The record details are: Title: The wind in the willows, Author: Grahame, Kenneth, Bib Call #: PZ7.G759W1 1999b, Edition: Pub Date: 1999, TCN: ocm45582649, Database ID: 19928331, Record Owner: hm-cat1, Created By: hm-cat1, Last Edited By: hm-cat1, Last Edited On: 2013-01-28 6:46 PM. The 'Holdings Maintenance' section shows a table with columns: #, Location/Barcode, Circulation M..., Loan Duration, Location, Price, Part, Status. The table contains one row: 1, EG-IN : Evergreen Indiana, 33946001289409, book : book : ... Normal, Fiction , 2nd Floor, 6.95, Damaged. The 'Consortial Total' is 0, 'Available' is 0.

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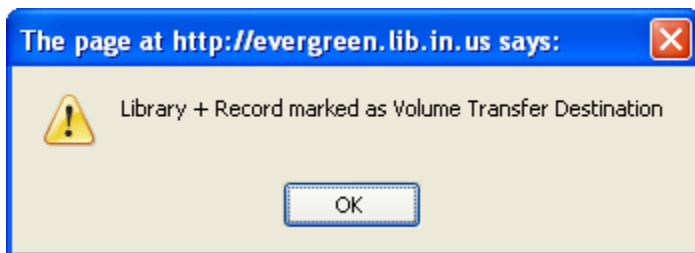
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To the transfer volume to this record, you will need to highlight the name of your library branch by clicking on it, as seen below. Then right click or click on **Actions for Selected Rows (Alt + F)** and select **Mark Library as Volume Transfer Destination (Alt + M)**.

The screenshot shows the Evergreen Indiana cataloging interface. At the top, there's a 'Record Summary' section with fields for Title, Author, Bib Call #, Edition, Pub Date, TCN, Database ID, Record Owner, Created By, Last Edited By, and Last Edited On. Below this is the 'Holdings Maintenance' section, which includes a dropdown menu for 'HMMPL : Hussey-Mayfield Memorial Branch' and a 'Limit' dropdown set to 'This Specialized Library'. There are checkboxes for 'Show Volumes', 'Show Items', and 'Hide Empty Libs', along with a 'Refresh' button. A table below shows a list of holdings with columns for #, Location/Barcode, Barcode, Circulation, Loan Duration, and Location. The third row is highlighted. To the right of the table is a context menu with options like 'Copy to Clipboard', 'Add Items to Buckets', 'Show Item Details', 'Make This Item Bookable (Y)', 'Show Last Few Circulations', 'Edit Items', 'Transfer Items to Previously Marked Volume', 'Link as Conjoined Items to Previously Marked Bib Record', 'Add Volumes', and 'Mark Library as Volume Transfer Destination'.

TIP: You must highlight your branch name, not the system name, even if your library has only one branch. If your branch name does not display, (seen here on line 3) make sure your branch is selected in the Holdings Maintenance drop down list and that there is no check mark in Hide Empty Libs, then click refresh.

A dialog box will pop up, informing you that you have marked the Volume Transfer Destination.



Click **OK**, or press **Enter**.

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Next go back to the record with the item you wish to transfer. If you do not have it open, bring it up in a new tab.

The screenshot displays a web application interface for cataloging. At the top, there are two tabs: '1 Bib Record: 15918673' and '2 Bib Record: ocm45582649'. The main content area is titled 'Record Summary (Add Volumes) (View MARC)'. It contains fields for 'Title: The wind in the willows', 'Author: Grahame, Kenneth', 'Bib Call #: PZ7.G759W1 2008b', 'Edition: Pub Date: 2008', 'TCN: 15918673', 'Database ID: 14970370', 'Record Owner:', 'Created By: FCPLR-CAT1', 'Last Edited By: FCPLR-CAT1', and 'Last Edited On: 2010-01-11 10:48 AM'. Below this is a 'Holdings Maintenance' section with a dropdown menu set to 'HMMPL: Hussey-Mayfield Memorial Branch' and a 'Limit: This Specialized Library' dropdown. There are checkboxes for 'Show Volumes', 'Show Items', and 'Hide Empty Libs', along with a 'Refresh' button. A table lists holdings with columns for '#', 'Location/Barcode', 'Circulation M...', 'Loan Duration', and 'Location'. The table has five rows, with the fourth row highlighted in blue. To the right of the table is a 'Actions for this Record' panel with various options like 'Copy to Clipboard', 'Add Items to Buckets', 'Show Item Details', 'Make This Item Bookable (Y)', 'Show Last Few Circulations', 'Edit Items', 'Transfer Items to Previously Marked Volume', 'Link as Conjoined Items to Previously Marked Bib Record', 'Add Volumes', 'Mark Library as Volume Transfer Destination', 'Add Items', 'Edit Volumes', 'Mark Volume as Item Transfer Destination', and 'Transfer Volumes to Previously Marked Library'. At the bottom left of the table are 'List Actions' and 'Print' buttons.

#	Location/Barcode	Circulation M...	Loan Duration	Location
1	EG-IN : Evergreen Indiana			
2	ZPL : Zionsville Public Library			
3	HMMPL : Hussey-Mayfield Memorial Branch			
4	FIC GRAHAME			
5	33946001289409	book : book : ...	Normal	Fiction : 2nd Floor

Click on the call number of the volume(s) you wish to transfer to highlight that line.

NOTE: If there is more than one item attached to the call number, all the items will be transferred when you transfer the volume.

TIP: If you wish to transfer multiple volumes to the same record, press the Control key as you click on the call numbers to highlight them.

Right click or click on **Actions for Selected Rows (Alt + F)** and select **Transfer Volumes to Previously Marked Library (Alt + T)**

TIP: If this is not an active selection, you did not highlight a volume line. You need to highlight the line with only the call number.

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A dialog box will open up allowing you to verify that the volume is being transferred to the correct record. Check it carefully!



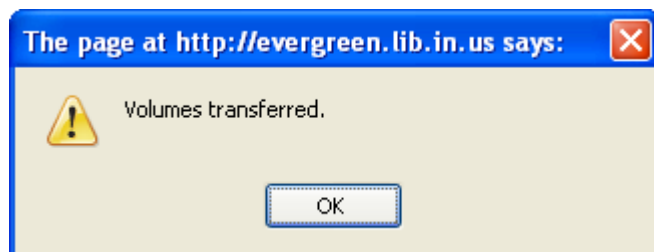
TIP: You can click **View MARC** to look at the MARC record, if needed.

NOTE: If you have forgotten to mark the volume transfer destination, and you have transferred other volumes in the same session, the volume will be transferred to the last record you marked, so if the information is wrong, click **Cancel (Alt + C)**.

TIP: Make sure the blue bar at the top of the window says “**Volume Transfer**.” If it says “**Item Transfer**,” then you are transferring only a single item (barcode), not the call number and item(s) as a unit.

If the information is correct, click **Transfer**.

A dialog box will pop up, confirming your transfer:



Click **OK**, or press **Enter**.

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The screen will refresh, and your volume will no longer be attached to the original record.

Record Summary (Add Volumes) (View MARC)

Title: The wind in the willows
Author: Grahame, Kenneth
Bib Call #: PZ7.G759W1 2008b

Edition: Pub Date: 2008

TCN: 15918673
Database ID: 14970370
Record Owner:

Created By: FCPLR-CAT1
Last Edited By: FCPLR-CAT1
Last Edited On: 2010-01-11 10:48 AM

Record 2 of 2 [Start] [Previous] [Next] [End] [Search Results] Actions for this Record

Holdings Maintenance

HMMPL Hussey-Mayfield Memorial Branch Limit: This Specialized Library

☒ Show Volumes ☒ Show Items ☐ Hide Empty Libs [Refresh]

Consortial Total: 1 Available: 1 Actions for Selected Rows

#	Location/Barcode	Circulation M...	Loan Duration	Location	Price	Part	Status
1	EG-IN : Evergreen Indiana						
2	ZPL : Zionsville Public Library						
3	HMMPL : Hussey-Mayfield Memorial Branch						

NOTE: If there are no other items attached to the record, the record will be automatically deleted, so if you close the tab, you may not be able to find it again.

If you still have your destination record open in another tab, you will need to click **Refresh** to see the transferred item.

Record Summary (Add Volumes) (View MARC)

Title: The wind in the willows
Author: Grahame, Kenneth
Bib Call #: PZ7.G759W1 1999b

Edition: Pub Date: 1999

TCN: ocm45582649
Database ID: 19928331
Record Owner:

Created By: hm-cat1
Last Edited By: hm-cat1
Last Edited On: 2013-01-28 6:46 PM

[Start] [Previous] [Next] [End] [Search Results] Actions for this Record

Holdings Maintenance

HMMPL Hussey-Mayfield Memorial Branch Limit: This Specialized Library

☒ Show Volumes ☒ Show Items ☐ Hide Empty Libs [Refresh]

Consortial Total: 1 Available: 0 Actions for Selected Rows

#	Location/Barcode	Barcode	Circulation ...	Loan Duration	Location	Price	Part	Status
1	EG-IN : Evergreen Indiana							
2	ZPL : Zionsville Public Library							
3	HMMPL : Hussey-Mayfield Memorial Branch							
4	FIC GRAHAME							
5	33946001289409	339460...	book : book : ...	Normal	Fiction . 2nd Floor	6.95		Damaged

Transferring Items from One Volume to Another

Transferring items is very similar to transferring volumes. You can transfer items (copies/barcodes) from one volume (call number) to another within the same record or branch or to other records or branches.

When you transfer items, you are transferring only items (barcodes), not the call number. You would do this when you have multiple items attached to a call number and you don't wish to transfer all of them, or if you are transferring a pre-cat item which does not have a call number.

You must have a call number already on the record where you wish to transfer the item. If there is no appropriate call number, you must add it before an item transfer can be done.

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To transfer items, in one tab, open the record where the item is currently in the Holdings Maintenance view.

Here we have two items attached to this volume. One is a hardback copy and belongs on this record. The highlighted item is a paperback edition which belongs on a different record.

NOTE: If you wanted to transfer both the items, you would use *Transfer Volumes*, not *Transfer Items*.

The screenshot shows the 'Holdings Maintenance' view for a record with TCN: AUTOGENERATED-5386 and Bib Record: 11775370. The record summary includes the title 'The perks of being a wallflower' by Stephen Chbosky. The holdings table lists two items: a hardback copy (33946001976419) and a paperback copy (33946002031073). The paperback copy is highlighted in blue.

#	Location/Barcode	Circulation ...	Loan Duration	Location	Price	Part	Status
1	EG-IN : Evergreen Indiana						
2	ZPL : Zionsville Public Library						
3	HMMPL : Hussey-Mayfield Memorial Branch						
4	TEEN FTC CHBOSKY						
5	33946001976419	book : book : ... Normal	Teen . 2nd Floor		23.95		On holds sh...
6	33946002031073	book : book : ... Normal	Teen . 2nd Floor		24.55		Checked out

In another tab, open the record where you want the item to be.

The screenshot shows the 'Holdings Maintenance' view for a record with TCN: 11775370 and Bib Record: 11775370. The record summary includes the title 'The perks of being a wallflower' by Stephen Chbosky. The holdings table lists three items: a hardback copy (33946001976419), a paperback copy (33946002031073), and a third item (33946002031073) which is highlighted in blue.

#	Location/Barcode	Circulation ...	Loan Duration	Location	Price	Part	Status
1	EG-IN : Evergreen Indiana						
2	ZPL : Zionsville Public Library						
3	HMMPL : Hussey-Mayfield Memorial Branch						

When you transfer items, you are moving a copy from one call number to another, so if there is no appropriate call number attached to the record, you will need to add one, as in this case.

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Highlight the branch name, and right click or click on **Actions for Selected Rows**. Select **Add Volumes (Alt + V)**

Record Summary ([Add Volumes](#)) ([View MARC](#))

Title: The perks of being a wallflower
Author: Chbosky, Stephen.
Bib Call #: P53553.H3469P47 1999

Edition: Pub Date: 1999
TCN: 11775370
Database ID: 19925069
Record Owner: Created By: myplmcat1-bunner
Last Edited By: myplmcat1-bunner
Last Edited On: 2013-01-15 2:46 PM

Record 1 of 1 [Start] [Previous] [Next] [End] [Search Results] Actions for this Record

Holdings Maintenance

HMMPL Hussey-Mayfield Memorial Branch Limit: This Specialized Library

☒ Show Volumes ☒ Show Items ☐ Hide Empty Libs Refresh Consortial Total: 10 Available: 6 Actions for Selected Rows

#	Location/Barcode	Circulation M...	Loan Duration	Location
1	EG-IN : Evergreen Indiana			
2	ZPL : Zionsville Public Library			
3	HMMPL : Hussey-Mayfield Memorial Branch			

Copy to Clipboard
Add Items to Buckets
Show Item Details
Make This Item Bookable (Y)
Show Last Few Circulations

Edit Items
Transfer Items to Previously Marked Volume
Link as Conjoined Items to Previously Marked Bib Record

Add Volumes
Mark Library as Volume Transfer Destination

The **Volume and Copy Creator** will open in a new tab:

1: hm-cat1@HMMPL-sarahc.evergreen.lib.in.us

File Edit Search Circulation Cataloging Acquisitions Booking Admin (-) Help

1 Bib Record: AUTOGENERATED-53868 2 Bib Record: 11775370 3 Add Volume/Item +

Record Summary ([View MARC](#))

Title: The perks of being a wallflower
Author: Chbosky, Stephen.
Bib Call #: P53553.H3469P47 1999

Edition: Pub Date: 1999
TCN: 11775370
Database ID: 19925069
Record Owner: Created By: myplmcat1-bunner
Last Edited By: hm-cat1
Last Edited On: 2013-01-28 5:8 PM

Volume and Copy Creator

Classification: <No Change> Prefix: <No Change> Call Number: Suffix: <No Change> BATCH Apply

Library # of volumes

HMMPL 1

Classification Prefix Call Number Suffix # of Copies Barcode / Part Des

Generic 1

Enter your Call Number in the **Call Number** box, and then click **Edit then Create** without entering a barcode.

1 Bib Record: AUTOGENERATED-53868 2 Bib Record: 11775370 3 Add Volume/Item +

Record Summary ([View MARC](#))

Title: The perks of being a wallflower
Author: Chbosky, Stephen.
Bib Call #: P53553.H3469P47 1999

Edition: Pub Date: 1999
TCN: 11775370
Database ID: 19925069
Record Owner: Created By: myplmcat1-bunner
Last Edited By: hm-cat1
Last Edited On: 2013-01-28 5:8 PM

Volume and Copy Creator

Classification: <No Change> Prefix: <No Change> Call Number: Suffix: <No Change> BATCH Apply

Library # of volumes

HMMPL 1

Classification Prefix Call Number Suffix # of Copies Barcode / Part Des

Generic TEEN FIC CHBOSKY 1

Auto-Generate Barcodes? ☒ Use Checkdigit ☐ Print Labels? Create with Defaults **Edit then Create**

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Your call number will be added with no items attached to it.

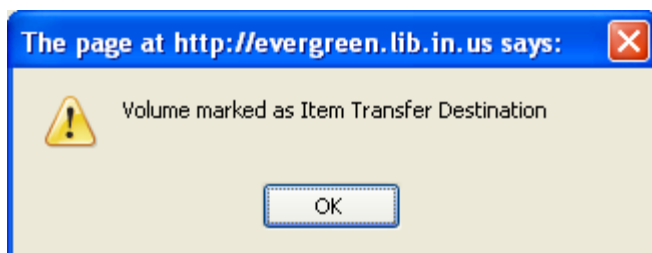
The screenshot shows the 'Record Summary' for a book titled 'The perks of being a wallflower' by Stephen Chbosky. The record number is 11775370. The 'Holdings Maintenance' section shows a table of holdings with columns for #, Location/Barcode, Circulation M..., Loan Duration, Location, Price, Part, and Status. The table lists four holdings: 1. EG-IN : Evergreen Indiana, 2. ZPL : Zionsville Public Library, 3. HMMPL : Hussey-Mayfield Memorial Branch, and 4. TEEN FIC CHBOSKY. The 'TEEN FIC CHBOSKY' holding is highlighted.

The call number is the location where you will transfer your item.

Click on the call number to highlight it. Then right click or click **Actions for Selected Rows (Alt + F)** and select **Mark Volume as Item Transfer Destination (Alt + M)**

This screenshot shows the 'Actions for Selected Rows' menu that appears when the 'TEEN FIC CHBOSKY' holding is selected. The menu includes options such as 'Copy to Clipboard', 'Add Items to Buckets', 'Show Item Details', 'Make This Item Bookable (Y)', 'Show Last Few Circulations', 'Edit Items', 'Transfer Items to Previously Marked Volume', 'Link as Conjoined Items to Previously Marked Bib Record', 'Add Volumes', 'Mark Library as Volume Transfer Destination', 'Add Items', 'Edit Volumes', 'Mark Volume as Item Transfer Destination', and 'Transfer Volumes to Previously Marked Library'. The 'Mark Volume as Item Transfer Destination' option is highlighted.

A dialog box will pop up telling you the volume has been marked:



Click **OK**, or press **Enter**.

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Next go back to the record with the item you wish to transfer. If you do not have it open, bring it up in a new tab.

The screenshot shows the 'Record Summary' for 'The perks of being a wallflower' by Stephen Chbosky. The record is identified by TCN: AUTOGENERATED-53861 and Database ID: 19764235. The 'Holdings Maintenance' section shows a table of holdings for the 'Hussey-Mayfield Memorial Branch' (HMMPL). The table has columns for #, Location/Barcode, Circulation M..., Loan Duration, and Location. Two rows are visible, both for 'TEEN FIC CHBOSKY'. The first row has barcode 33946001976419 and the second has 33946002031073. A right-click context menu is open over the first row, showing options like 'Copy to Clipboard', 'Add Items to Buckets', and 'Transfer Items to Previously Marked Volume'.

#	Location/Barcode	Circulation M...	Loan Duration	Location
1	EG-IN : Evergreen Indiana			
2	ZPL : Zionsville Public Library			
3	HMMPL : Hussey-Mayfield Memorial Branch			
4	TEEN FIC CHBOSKY			
5	33946001976419	book : book : ...	Normal	Teen . 2nd Floor
6	33946002031073	book : book : ...	Normal	Teen . 2nd Floor

Highlight the barcode of the item you wish to transfer. Then right click or click on **Actions for Selected Rows (Alt + F)** and select **Transfer Items to Previously Marked Volume (Alt + T)**.

A window will open up allowing you to verify that the item is being transferred to the correct record and volume. Note the volume (call number) is listed in the text at the top of the box. Here the volume is "TEEN FIC CHBOSKY." Make sure the volume and record are correct!

The 'Item Transfer' dialog box is shown, with a title bar that says 'Item Transfer'. The main text reads: 'Transfer items from their original volumes to HMMPL's volume labelled TEEN FIC CHBOSKY on the following record (and change their circulation libs to match)?'. Below this text are 'Transfer' and 'Cancel' buttons. The 'Record Summary' section shows details for 'The perks of being a wallflower' by Stephen Chbosky, including the record number 11775370 and the call number P53553.H3469P47 1999.

Record Summary (View MARC)

Title: The perks of being a wallflower **Edition:** **TCN:** 11775370 **Created By:** mvplmcat1-bunner
Author: Chbosky, Stephen. **Pub Date:** 1999 **Database ID:** 19925069 **Last Edited By:** hm-cat1
Bib Call #: P53553.H3469P47 1999 **Record Owner:** **Last Edited On:** 2013-01-28 5:8 PM

TIP: You can click **View MARC** to look at the MARC record, if needed.

NOTE: If you have forgotten to mark the item transfer destination, and you have transferred other items in the same session, the item will be transferred to the last volume you marked, so if the information is wrong, click **Cancel (Alt + C)**.

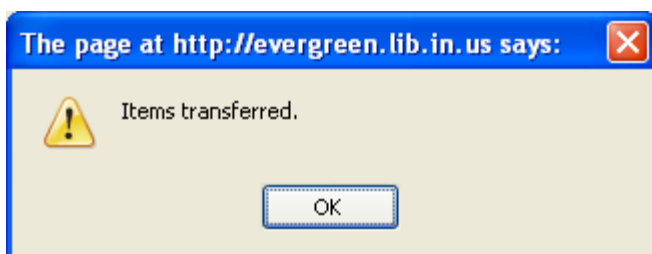
TIP: Make sure blue bar at the top of the window says "**Item Transfer**." If it says "Volume Transfer," then you are transferring the call number and all volumes attached to it, not just an item or items.

If the volume and record are correct, click the **Transfer** button. Otherwise, click **Cancel (Alt + C)**.

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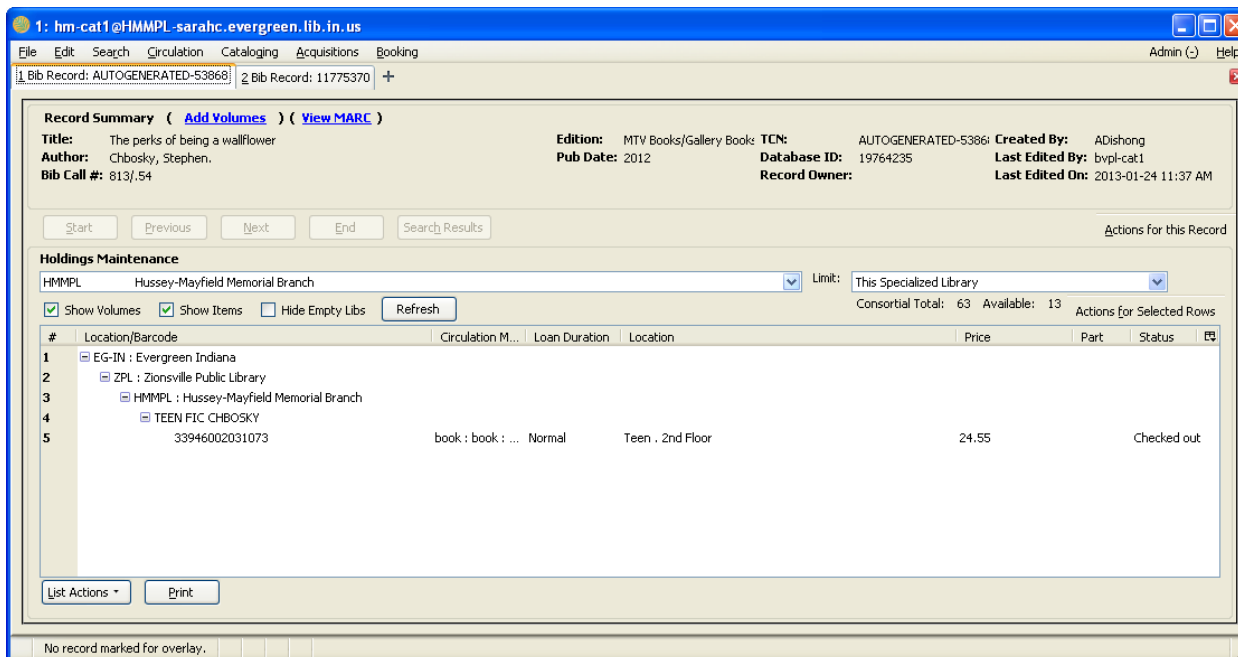
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A dialog box will pop up, telling you that the item has been transferred.



Click **OK** or press **Enter**.

The screen will refresh, and your item/barcode will no longer be attached to the original record.



NOTE: If this was the only item attached to the record, the record will be automatically deleted, so if you close the tab, you may not be able to find it again. If there are other items attached to this record, but no other items are attached to your call number, you must delete the call number. See **Deleting Volume Records from Evergreen, Chapter 18**, if needed.

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If you still have your destination record open in another tab, you will need to click Refresh to see the transferred item.

The screenshot shows the 'Record Summary' for 'The perks of being a wallflower' by Stephen Chbosky. The 'Holdings Maintenance' section is active, showing a list of holdings for 'Hussey-Mayfield Memorial Branch'. The 'Refresh' button is circled in red. The table below shows the holdings data:

#	Location/Barcode	Circulation M...	Loan Duration	Location	Price	Part	Status
1	EG-IN : Evergreen Indiana						
2	ZPL : Zionsville Public Library						
3	HMMPL : Hussey-Mayfield Memorial Branch						
4	TEEN FIC CHBOSKY						
5	33946001976419	book : book : ...	Normal	Teen , 2nd Floor	23.95		On holds shelf

Transferring Volumes to a Different Branch

Items and volumes may also be transferred between branches. The process is the same as transferring between records.

Open the record with the items in Holdings Maintenance view. Make sure the branches are all displaying, as seen below.

The screenshot shows the 'Record Summary' for 'Fine woodworking best workshops' by TT152.F56 2013. The 'Holdings Maintenance' section is active, showing a list of holdings for 'Zionsville Public Library'. The 'Refresh' button is highlighted. The table below shows the holdings data:

#	Location/Barcode	Circulation ...	Loan Duration	Location	Price	Part	Status
1	EG-IN : Evergreen Indiana						
2	ZPL : Zionsville Public Library						
3	HMMPL : Hussey-Mayfield Memorial Branch						
4	684.08 FINE						
5	33946002788029	book new : b...	Normal	New Books , 2nd Floor	24.95		Available
6	SMCC : SullivanMunce Cultural Center						

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If the branches are not displaying, select your library system from the Holdings Maintenance drop-down list.

Record Summary (Add Volumes) (View MARC)

Title: Fine woodworking best workshops Edition: Pub Date: 2013 TCN: ocn800037371 Created By: hm-cat1
Author: Database ID: 20085979 Last Edited By: hm-cat1
Bib Call #: TT152.F56 2013 Record Owner: Last Edited On: 2013-08-13 5:54 PM

Record 1 of 3 [Start] [Previous] [Next] [End] [Search Results] Actions for this Record

Holdings Maintenance

Green and bold in the list below means the library has volumes for this record.

ZPL Zionsville Public Library Limit: Everywhere

Location/Barcode	Circulation Mo...	Loan Duration	Location	Price	Part	Status
TCPCPLT			Perry County Public Library - Tell City			
WOCPL			Wolcott Public Library			
WOCPLW			Wolcott Public Library - Wolcott			
WPL			Warren Public Library			
WPLW			Warren Public Library - Warren			
WTPL			Washington Township Public Library			
WTPLL			Washington Township Public Library - Lynn			
WUPL			Westfield Washington Public Library			
WUPLW			Westfield Washington Public Library - Westfield			
ZPL			Zionsville Public Library			
HMMPL			Hussey-Mayfield Memorial Branch			
SMCC			SullivanMunce Cultural Center			

Then select **This specialized library** from the Limit: drop down list.

Record Summary (Add Volumes) (View MARC)

Title: Fine woodworking best workshops Edition: Pub Date: 2013 TCN: ocn800037371 Created By: hm-cat1
Author: Database ID: 20085979 Last Edited By: hm-cat1
Bib Call #: TT152.F56 2013 Record Owner: Last Edited On: 2013-08-13 5:54 PM

Record 1 of 3 [Start] [Previous] [Next] [End] [Search Results] Actions for this Record

Holdings Maintenance

ZPL Zionsville Public Library Limit: Everywhere

☒ Show Volumes ☒ Show Items ☐ Hide Empty Libs **Refresh**

#	Location/Barcode	Circulation Mo...	Loan Duration	Location	Price	Part	Status
1	EG-IN : Evergreen Indiana						
2	ZPL : Zionsville Public Library						

Click the **Refresh** button, and all the branches will display:

Record Summary (Add Volumes) (View MARC)

Title: Fine woodworking best workshops Edition: Pub Date: 2013 TCN: ocn800037371 Created By: hm-cat1
Author: Database ID: 20085979 Last Edited By: hm-cat1
Bib Call #: TT152.F56 2013 Record Owner: Last Edited On: 2013-08-13 5:54 PM

Record 1 of 3 [Start] [Previous] [Next] [End] [Search Results] Actions for this Record

Holdings Maintenance

ZPL Zionsville Public Library Limit: This Specialized Library

☒ Show Volumes ☒ Show Items ☐ Hide Empty Libs **Refresh**

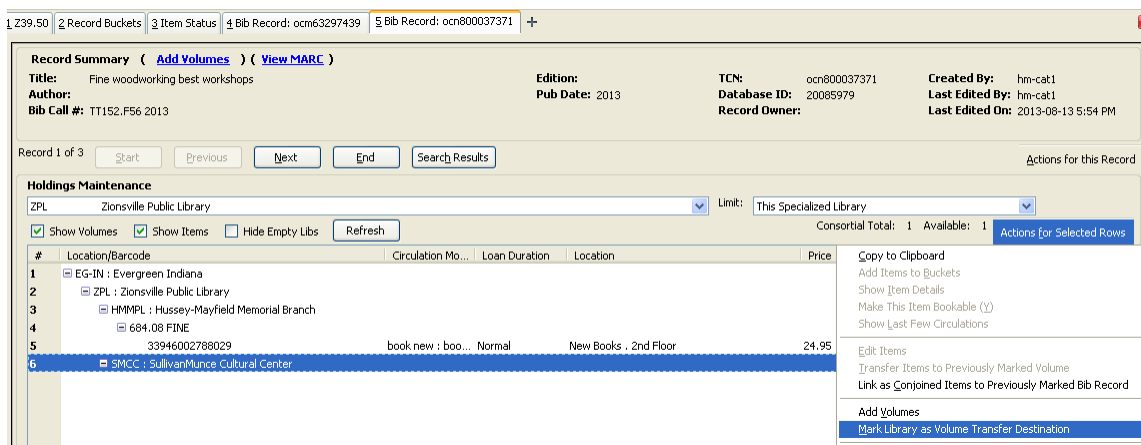
#	Location/Barcode	Circulation Mo...	Loan Duration	Location	Price	Part	Status
1	EG-IN : Evergreen Indiana						
2	ZPL : Zionsville Public Library						
3	HMMPL : Hussey-Mayfield Memorial Branch						
4	684.08 FINE						
5	33946002788029	book new : boo...	Normal	New Books , 2nd Floor	24.95		Available
6	SMCC : SullivanMunce Cultural Center						

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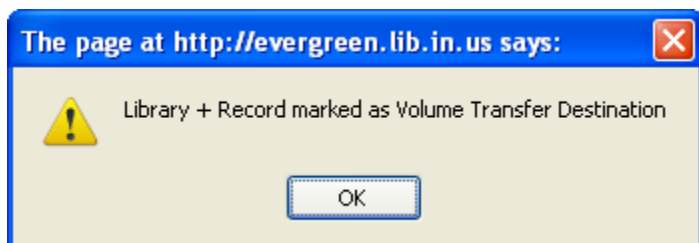
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Here we have a volume and item attached to the Hussey-Mayfield Memorial Branch which we will be moving to the Sullivan Muncie Cultural Center.

To transfer volumes from one branch to another, click on the branch where you wish to transfer the volumes to highlight it. Then either right-click or click **Actions for Selected Rows (Alt + F)** and select **Mark Library as Volume Transfer Destination**.

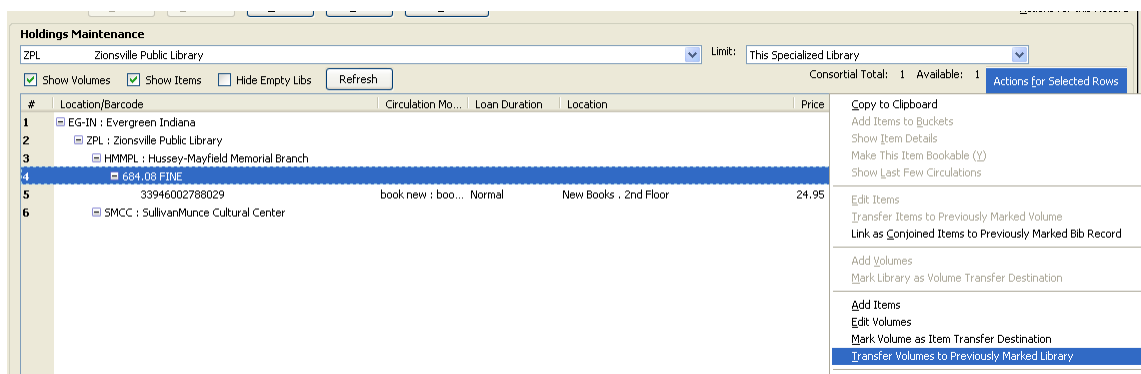


A dialog box will open to tell you a branch has been marked:



Click **OK** or press **Enter**.

Click on the Volume line of the item being transferred to highlight it.



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NOTE: If there is more than one item attached to the call number, all the items will be transferred when you transfer the volume.

TIP: If you wish to transfer multiple volumes to the same record, press the Control key as you click on the call numbers to highlight them.

Right click or click on **Actions for Selected Rows (Alt + F)** and select **Transfer Volumes to Previously Marked Library (Alt + T)**

TIP: If this is not an active selection, you did not highlight a volume line. You need to highlight the line with only the call number.

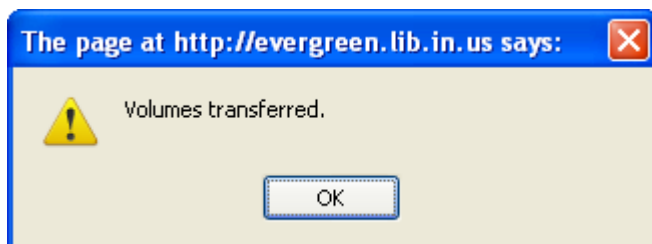
A dialog box will open up allowing you to verify that the volume is being transferred to the correct branch and record. Check it carefully! The branch is highlighted in the example below. Be sure to check the title as well.

If everything is correct, click **Transfer**.



NOTE: If you have forgotten to mark the volume transfer destination, and you have transferred other volumes in the same session, the volume will be transferred to the last record and branch you marked, so if the information is wrong, click **Cancel (Alt + C)**.

A dialog box will inform you the volume(s) have been transferred.



Click **OK** or press **Enter**.

The screen will refresh, and your volume(s) will be transferred to the selected branch.

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Below you can see the volume and item are now attached to the Sullivan Munce Cultural Center.

#	Location/Barcode	Circulation Mo...	Loan Duration	Location	Price	Part	Status
1	EG-IN : Evergreen Indiana						
2	ZPL : Zionsville Public Library						
3	HMMPL : Hussey-Mayfield Memorial Branch						
4	SMCC : SullivanMunce Cultural Center						
5	684.08 FINE						
6	33946002788029	book new : boo...	Normal	New Books - 2nd Floor	24.95		Available

NOTE: The Circulation Library and Owning Library will automatically change to the new branch, but the shelving location will not change. If you assign shelving locations at the branch level, you will need to use the Copy Editor to change the shelving location at this point. See **Chapter 7—Using the Copy Editor** if needed.

Transferring Items to a Different Branch

When you have multiple items attached to the same volume/call number and you do not wish to transfer all of them, or you wish to transfer some to one branch and some to another, you will use transfer items instead of transfer volumes.

To transfer items between branches, open the record with the items in Holdings Maintenance view. Make sure the branches are all displaying, as seen below.

#	Location/Barcode	Vo...	Co...	Circulation Library	Due Date	Location	Owning Library	Part	Status
1	EG-IN : Evergreen Indiana								
2	ZPL : Zionsville Public Library								
3	HMMPL : Hussey-Mayfield... 1		<2>						
4	DVD j 523.2 MAGIC		2				HMMPL		
5	33946002420763			HMMPL	2013-09-23 11:59 P...	Audio Visual - 1st ...	HMMPL		Checked out
6	33946002469018			HMMPL		Audio Visual - 1st ...	HMMPL		Available
7	SMCC : SullivanMunce Cul... 0		<0>						

If the all the branches are not displaying, see page 10.13.

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Chapter 10 – Transferring Volumes and Items

When you transfer items, you are moving a copy from one call number to another, so if there is no appropriate call number attached to the branch where you will be transferring the item, you will need to add one, as in this case.

Highlight the branch name, and right click or click on **Actions for Selected Rows (Alt + F)**. Select **Add Volumes (Alt + V)**

Record Summary ([Add Volumes](#)) ([View MARC](#))

Title: The Magic school bus.Space adventures Edition: TCN: i1568329172 Created By: admin
Author: Jacobs, Lawrence. Pub Date: 2003 Database ID: 18838522 Last Edited By: admin
Bib Call #: QB500.22.M34 2003 Record Owner: Last Edited On: 2010-12-07 9:21 PM

Record 1 of 15 Start Previous Next End Search Results Actions for this Record

Holdings Maintenance

ZPL : Zionsville Public Library Limit: This Specialized Library

☒ Show Volumes ☒ Show Items ☐ Hide Empty Libs Refresh Consortial Total: 22 Available: 18 Actions for Selected Row:

#	Location/Barcode	Vo...	Co...	Circulation Library	Due Date	Location
1	EG-IN : Evergreen Indiana					
2	ZPL : Zionsville Public Library					
3	HMMPL : Hussey-Mayfield... 1	<2>				
4	DVD j 523.2 MAGIC	2				
5	33946002420763			HMMPL	2013-09-23 11:59 P...	Audio Visual - 1st ...
6	33946002469018			HMMPL		Audio Visual - 1st ...
7	SMCC : SullivanMunce Cul... 0	<0>				

Copy to Clipboard
Add Items to Buckets
Show Item Details
Make This Item Bookable (Y)
Show Last Few Circulations
Edit Items
Transfer Items to Previously Marked Volume
Link as Conjoined Items to Previously Marked Bib Record
Add Volumes
Mark Library as Volume Transfer Destination

The **Volume and Copy Creator** will open in a new tab:

Record Summary ([View MARC](#))

Title: The Magic school bus.Space adventures Edition: TCN: i1568329172 Created By: admin
Author: Jacobs, Lawrence. Pub Date: 2003 Database ID: 18838522 Last Edited By: admin
Bib Call #: QB500.22.M34 2003 Record Owner: Last Edited On: 2010-12-07 9:21 PM

Volume and Copy Creator

Classification: <No Change> Prefix: <No Change> Call Number: Suffix: <No Change> BATCH: [Apply](#)

Library	# of volumes	Classification	Prefix	Call Number	Suffix	# of Copies	Barcode / Part Designatn
SMCC	1	Generic		QB500.22.M34 2003		1	

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Enter your Call Number in the **Call Number** box, and then click **Edit then Create** without entering a barcode.

Record Summary (View MARC)

Title: The Magic school bus.Space adventures
Author: Jacobs, Lawrence.
Bib Call #: Q8500.22.M34 2003

Edition: Pub Date: 2003

TCN: i1568329172
Database ID: 18838522
Record Owner:

Created By: admin
Last Edited By: admin
Last Edited On: 2010-12-07 9:21 PM

Volume and Copy Creator

Classification: <No Change> Prefix: <No Change> Call Number: Suffix: <No Change> BATCH: Apply

Library: SMCC # of volumes: 1

Classification: Generic Prefix: Call Number: DVD j 523.2 MAGIC Suffix: # of Copies: 1 Barcode / Part Designati:

Auto-Generate Barcodes? Use Checkdigit Print Labels? Create with Default Edit then Create

Your call number will be added with no items attached to it:

Record Summary (Add Volumes) (View MARC)

Title: The Magic school bus.Space adventures
Author: Jacobs, Lawrence.
Bib Call #: Q8500.22.M34 2003

Edition: Pub Date: 2003

TCN: i1568329172
Database ID: 18838522
Record Owner:

Created By: admin
Last Edited By: admin
Last Edited On: 2010-12-07 9:21 PM

Record 1 of 15 Start Previous Next End Search Results Actions for this Record

Holdings Maintenance

ZPL Zionsville Public Library Limit: This Specialized Library

Show Volumes Show Items Hide Empty Libs Refresh Consortial Total: 22 Available: 18 Actions for Selected Row:

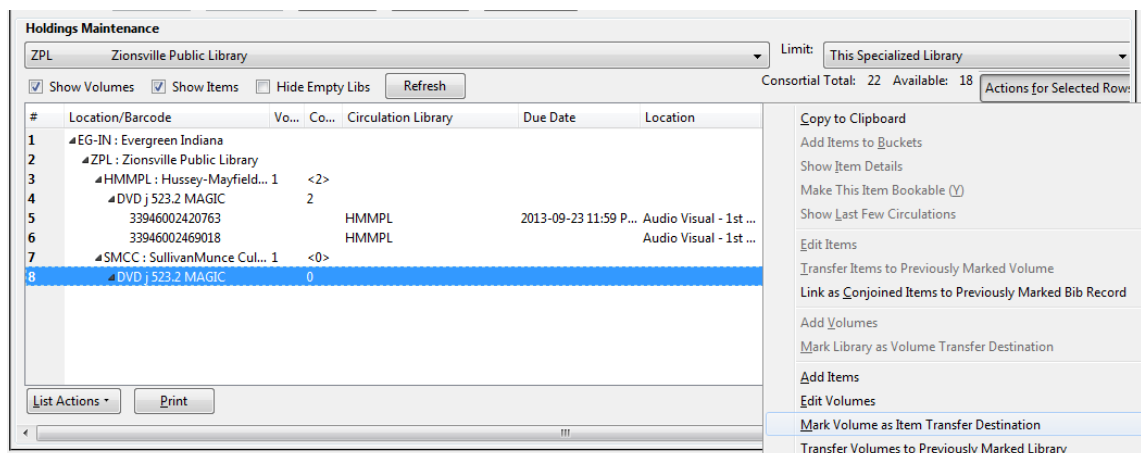
#	Location/Barcode	Vo...	Co...	Circulation	Library	Due Date	Location	Owning Library	Part	Status
1	EG-IN : Evergreen Indiana									
2	ZPL : Zionsville Public Library									
3	HMMPL : Hussey-Mayfield... 1	<2>								
4	DVD j 523.2 MAGIC		2					HMMPL		
5	33946002420763			HMMPL		2013-09-23 11:59 P...	Audio Visual - 1st ...	HMMPL		Checked out
6	33946002469018			HMMPL			Audio Visual - 1st ...	HMMPL		Available
7	SMCC : SullivanMunce Cul... 1	<0>								
8	DVD j 523.2 MAGIC		0					SMCC		

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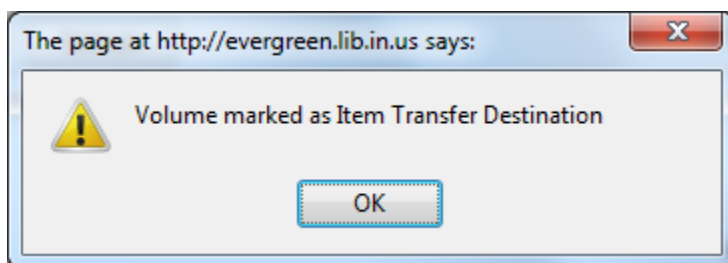
Chapter 10 – Transferring Volumes and Items

The call number is the location where you will transfer your item.

Click on the call number to highlight it. Then right click or click **Actions for Selected Rows (Alt + F)** and select **Mark Volume as Item Transfer Destination (Alt + M)**

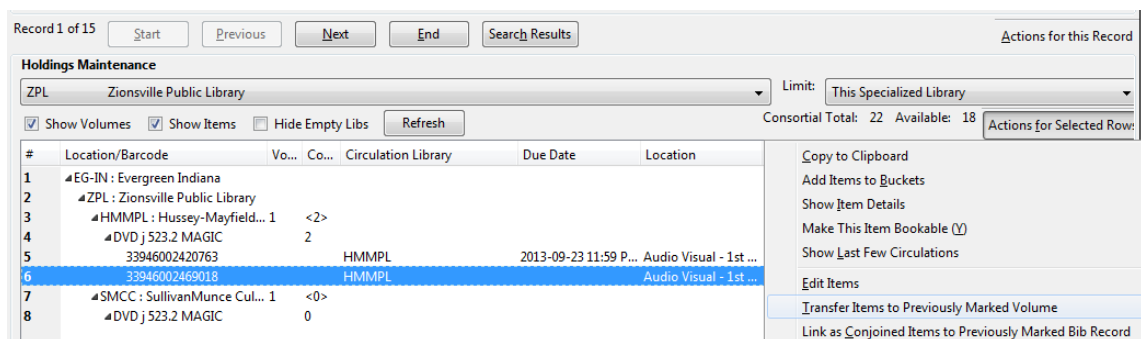


A dialog box will pop up telling you the volume has been marked:



Click **OK**, or press **Enter**.

Next highlight the item you wish to transfer. Then right click or click on **Actions for Selected Rows (Alt + F)** and select **Transfer Items to Previously Marked Volume (Alt + T)**.

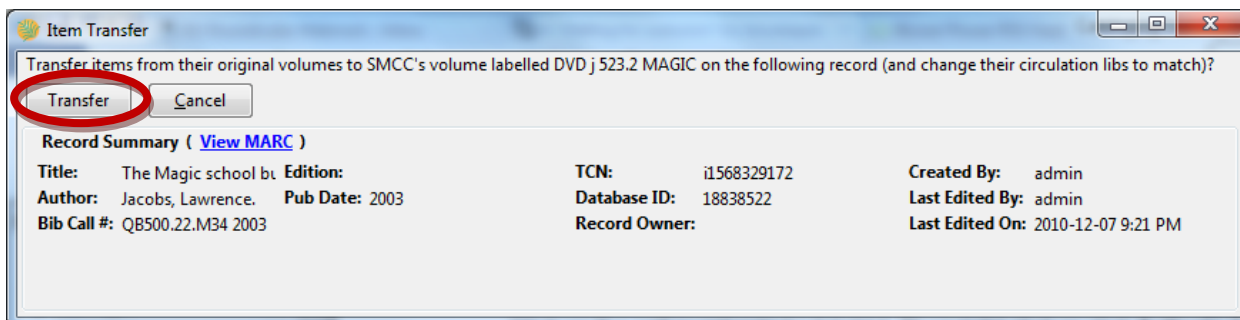


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A window will open up allowing you to verify that the item is being transferred to the correct branch, record and volume. Note the volume (call number) is listed in the text at the top of the box. Here the branch is “SMCC.”

NOTE: If you have forgotten to mark the item transfer destination, and you have transferred other items in the same session, the item will be transferred to the last volume you marked, so make sure the volume and record are correct as well. If the information is wrong, click **Cancel (Alt + C)**.

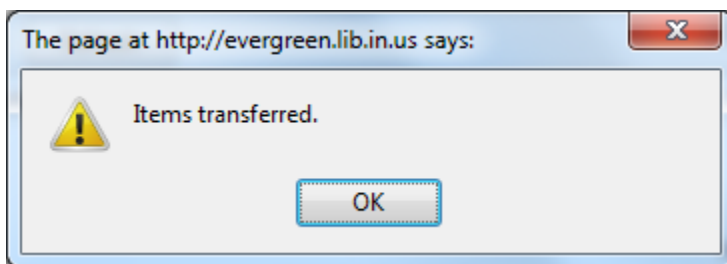


TIP: You can click **View MARC** to look at the MARC record, if needed.

TIP: Make sure bar at the top of the window says “**Item Transfer**.” If it says “**Volume Transfer**,” then you are transferring the call number and all volumes attached to it, not just an item or items.

If the transfer is correct, click the **Transfer** button. Otherwise, click **Cancel (Alt + C)**.

A dialog box will pop up, telling you that the item has been transferred.



Click **OK** or press **Enter**.

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The screen will refresh, and your item/barcode will no longer be attached to the original record.

The screenshot shows a web-based cataloging interface. At the top, there's a navigation bar with tabs: File, Edit, Search, Circulation, Cataloging, Acquisitions, and Booking. Below this is a toolbar with buttons for Record Buckets, Item Status, and Bib Record. The main content area is titled 'Record Summary (Add Volumes) (View MARC)'. It displays metadata for a record: Title 'The Magic school bus.Space adventures', Author 'Jacobs, Lawrence.', Bib Call # 'QB500.22.M34 2003', Edition, Pub Date '2003', TCN 'i1568329172', Database ID '18838522', Record Owner, Created By 'admin', Last Edited By 'admin', and Last Edited On '2010-12-07 9:21 PM'. Below the metadata is a 'Holdings Maintenance' section. It includes a dropdown for 'ZPL' (Zionsville Public Library) and a 'Limit' dropdown set to 'This Specialized Library'. There are checkboxes for 'Show Volumes', 'Show Items', and 'Hide Empty Libs', along with a 'Refresh' button. A table displays the holdings with columns: #, Location/Barcode, Vo..., Co..., Circulation Library, Due Date, Location, Owning Library, Part, and Status. The table shows two rows of holdings for 'HMMPL : Hussey-Mayfield...' and 'SMCC : SullivanMunce Cul...'. At the bottom, there are buttons for 'List Actions' and 'Print'.

#	Location/Barcode	Vo...	Co...	Circulation Library	Due Date	Location	Owning Library	Part	Status
1	EG-IN : Evergreen Indiana								
2	ZPL : Zionsville Public Library								
3	HMMPL : Hussey-Mayfield...	1	<1>				HMMPL		
4	DVD j 523.2 MAGIC	1					HMMPL		
5	33946002420763			HMMPL	2013-09-23 11:59 P...	Audio Visual - 1st ...	HMMPL		Checked out
6	SMCC : SullivanMunce Cul...	1	<1>				SMCC		
7	DVD j 523.2 MAGIC	1					SMCC		
8	33946002469018			SMCC		Audio Visual - 1st ...	SMCC		Available

NOTE: The Circulation Library and Owning Library will automatically change to the new branch, but the shelving location will not change. If you assign shelving locations at the branch level, you will need to use the Copy Editor to change the shelving location at this point. See **Chapter 7—Using the Copy Editor** if needed.